

# HIGH VOLUME ARCHIVE MANAGEMENT

A Financial Services Company Upgrades and Consolidates their Content Management



## BACKGROUND

This large financial group offers a range of services, including wealth management, life and health insurance, property and casualty insurance, personal services and business services. With more than 7 million customers, they employ close to 50,000 people in multiple locations. As part of a wide ranging business initiative, the financial services company adopted EMC Documentum as an enterprise content management platform for all legal, regulatory and business documents. As part of this unified content platform initiative an existing FileNet system was migrated to the new platform.

### The Challenge

A critical requirement was for EMC Documentum to archive the high volume business reports and customer communications generated as text reports by line of business systems. The company had over 250 different types of reports and over one billion documents that required archiving and records management. Some report batches contained over 400,000 individual documents.

As part of an upgrade of the EMC Documentum infrastructure from v6.6 to v7.2 they needed to upgrade the existing EMC Documentum Archive Services for Reports application to CrawfordTech PRO Archiver.

The company needed a solution that would provide for an in-place upgrade of their existing Documentum Archive Services for Reports software, while providing compatibility with EMC Documentum 7.2. The ASR software was only compatible up to Documentum 6.7 and could not be used with the new Documentum system. In addition the new solution needed to support the no-burst storage model that had been implemented. This allowed large batches to be stored efficiently, but supported the indexing and retrieval of individual documents through standard Documentum APIs and user interfaces.

## At a Glance

### CrawfordTech Products:

PRO Archiver for Documentum

### Background:

- This large financial group offers a range of services to over 7 million customers
- They had adopted EMC Documentum as their enterprise content management platform, but upgraded the existing EMC Document Archive Services for Reports application to CrawfordTech PRO Archiver

### Objective:

- To upgrade and migrate over 250 report types and over one billion documents, with some report batches containing over 400,000 individual documents.

### Solution:

- PRO Archiver provided a low impact solution, maintaining compatibility with current EMC Documentum versions, and supporting their high volume multi-node configuration.

### Results:

- A seamless transition that now supports nearly 8 million documents added daily, and ensures that business critical reports and customer communications are available to call center staff.



## Solution

The company was running ASR in a multi-node processing setup, which allowed them to transform, index and ingest data into Documentum concurrently. During the FileNet migration as many as 80 nodes were used to ingest legacy content. However, normal business operations used between 10 and 15 nodes with 20 at peak periods such as end of month.

The financial services company selected PRO Archiver as their upgrade path for ASR because it provided a seamless and low impact solution, while remaining compatible with current EMC Documentum product versions. PRO Archiver was also able to support their high volume multi-node configuration.

## Benefits

The company was successfully able to upgrade from Documentum 6.6 to Documentum 7.2 for customer communications and report archiving. The new archive uses PRO Archiver to provide features previously delivered using ASR. PRO Archiver for Documentum provides the key enabling technology for converting and indexing text print streams into PDF for archiving purposes.

Staff members have access to statements via secure online portals which are accessed thousands of times each day, eliminating the need to print and distribute document internally. Nearly 8 million new documents are added to the archive daily and the archive monthly and the archive contains a billion records.

The combined EMC and Crawford Technologies solution ensures that business critical reports and customer communications are available to call center staff, to help answer customer enquiries and deliver efficient business services.

## CrawfordTech Solutions

Crawford Technologies develops software and solutions to help enterprises optimize and improve the secure and accessible delivery, storage and presentment of their customer communications.

With over 1,800 customers on six continents, Crawfordtech solutions and know-how enable the largest banks, insurers, healthcare providers, utilities and print services companies to use their existing technologies, documents and data in new ways. We help them navigate the challenges in leveraging legacy applications in the platforms and applications of the future.

CrawfordTech's products, services and domain expertise reside at the nexus of content, data, and output management and are essential components of our customers' digital transformation, output management and document accessibility strategies.